**Agency PTM Open House**

Hosted: August 17th

Answers to questions below provided by P&P Supervisor team

| # | Question | Answer |
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| 1 | For the end of your presentation: Will you be sending the recording of today's presentation out to the attendees? I would love to share this with my workgroup for those that were not able to attend. Thanks! | Yes! We will post the recording on our website. |
| 2 | Could we also get a copy of this PowerPoint as well for the same reason? | Yes! We will post the presentation on our website. |
| 3 | how does the procurement modernization project interact with other grant management systems, such as ZoomGrants? thanks. | TBD |
| 4 | When does the new system go 'live'? | Currently we plan to launch the new system in October 2020, please continue to check your email and the PTM project website for updates. |
| 5 | What is the training plan for users using the concur system? Is it open to all users or just certain staff? | We are finalizing the training plan, however, the training will be available to all who would like to participate. |
| 6 | Will the in-app messaging notify you via email if there is a message? | Yes. The system is configured to provide notifications via email when an action is required. |
| 7 | Will Admin be able to do this for the travelers? | Yes. Concur calls this a delegate. |
| 8 | Will we still be able to process travel expenses on behalf of others? | Yes. Concur calls this a delegate. |
| 9 | How to we ensure security for PCS related items for suppliers using system from outside. | BRC and KCIT are handling this |
| 10 | How will AP access the PCS changes within the new | AP functions will remain the same, just using a new tool. |
| 11 | can users use their own frequent flyer accounts. | Yes. You can include your frequent flyer information within your Concur profile. |
| 12 | Question for Rena....Rena will the traveler now be responsible for their own travel or will the division travel coordinator need to do the work on concur | You have the ability to choose a delegate to help assist you with your travel needed within the Concur system. |

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| 13 | With travel...will each traveler be responsible for booking their own travel and reimbursements within Concur? | Travelers will have the option to book and submit for reimbursement on their own, or they can use a delegate to perform the function on their behalf. |
| 14 | Who will manage the new system? FTE dedicated person to answer technical questions. | We have a new travel specialist position within P&P to be the centralized "Point of Contact" for travel. |
| 15 | DPH does a lot of travel that is not planned, per invitations for our folks to provide their national expertise. How does Concur manage unplanned travel? | You would submit a single pre-trip travel request for approval which is not connected to your annual travel plan. |
| 16 | Can you tell us a little more about the contract management component of the new system? | Follow-up required - more information to come |
| 17 | With Concur coming along will we still need a T-Card? | Yes, T-Cards will be required for travel related expenses. |
| 18 | For Concur - will the approval for employees requesting to travel from supervisors also be through that interface? | Yes, Concur is an end-to-end travel system which includes the ability to submit and approve of all Pre-Trip Approvals within the system. |
| 19 | Are all of the current service request functions you listed going to replaced with similar functionality in the new system? | Yes, we have done some updates and will cover this in training sessions and user documentation. |
| 20 | Will we get link to have access to Cloud and Concur after training or? | Yes. We will be providing training updates via the PTM website and email notifications. |
| 21 | Can you provide additional specifics on the cutover plan to the new system? Example, open requests being migrated over to it, last day to use the old, etc. | More information on this will be in future communications and on our website, as well as in September Open House. |
| 22 | will there be enough room in training classes so that training is happening prior to live date in October | Training will be virtual, so it will be easier to accommodate more people. |
| 23 | How will we be trained in the use of the system? | We are in the process of mapping out all the training needs required for the new Oracle procurement system. Training updates will be available via the PTM website and email notifications. |
| 24 | Will vendors have to add their information in the new system if they are already in OVR? Who is responsible for contacting all of them? | Yes. All suppliers will be required to register in the new system. The PTM Change Management team has already reached out to the supplier community to inform them of their need to register. |
| 25 | Does each traveler need to have their own user account? | Yes |

| 26 | Has this system been successfully implemented in other large local governments? | Yes. We are in contact with other agencies who have implemented the same system to assist with out benchmarking exercise. |
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| 27 | Will the Concur system be implemented across the County in the same way or will certain agencies use it | Concur is expected to be updated the same across agencies. |
| 28 | In the new system, will we have to make changes to how the proxy users are set up in Oracle, or will they stay the same as they are now | In Concur, you will need to setup a delegate within your profile, if needed. |
| 29 | what specific contract management improvements are included in PTM? | Follow-up required - more information to come |
| 30 | Going back to the pcard question - will 2 separate cards be needed - 1 pcard, 1 concur credit card?  Or will it be only 1 card? | Yes, we will require two separate cards. |
| 31 | Will mileage reimbursements fall under Concur or stay under Oracle EBS? | Mileage reimbursement will be captured in Concur. |
| 32 | So we will have to set up proxy users in the new system, correct? | In Concur, you will need to setup a delegate within your profile, if needed. |
| 33 | I'm assuming all travel would have to be approved first before we enter anything into Concur right? Since most if not all travel is not allowed at this time unless its considered essential? | All trips must be approved prior to booking. The Pre-Trip Approval process is actually done within the Concur system. |
| 34 | Would non employee travelers, traveling for county business have access to Concur? Does it involve EE ID? | No |
| 35 | Will a revised/updated King County "Authorized Travel, Meal and Expense Reimbursement for County Employees" policy accompany this launch? | Yes, we are updating our travel and reimbursement policy in partnership with representatives across the County. |
| 36 | How does Concur handle the approval process within each department. | An approval workflow based off HR hierarchy |
| 37 | Will contract invoices be tracked with the contracts now? | No, AP will continue as usual with Oracle EBS.  We are looking into electronic invoicing . |
| 38 | does P&P plan to have a "sandbox" set up, so we can play in the system before it goes live? | Yes. We currently have a sandbox set up for P&P staff to learn the system in order to support other agency users. Agency users will not have access to the sandbox. |

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| 39 | It is rare....however will Concur handle international travel easily? Also, thank you all for providing all of us this invaluable information! Bravo! | Yes! |
| 40 | The paper-intensive P-Card process feels unwieldy and inefficient, especially in the telecommute environment. Will there be a later Concur implementation phase that will capture the P-Card process? | No |
| 41 | Is there dedicated staff time to training the community on how to use the new system? I'm thinking about non profits and /or smaller business who may need additional help navigate the new system and process. | Yes. The P&P and BRC Training Team is dedicated to creating training to ensure agency users are ready to use the system in the fall. |
| 42 | Do you have a standard email to send to vendors that we can have for those vendors that are not in OVR but agencies want to get them to register in the new portal, or should we send vendor information to Procurement to do this? | Through Change Management efforts and there are ongoing communications, check your emails! |
| 43 | Have any large agencies in WA state used this system? | There are many large government agency's that have implemented similar Oracle procurement systems. |
| 44 | Will there be additional costs to departments in terms of central rates or overhead as a result of operations and maintenance to this new system (KCIT, BRC, additional FTE, etc.)? | We don't anticipate it would, but this discussion occurs at the department head level. We will look into it. |
| 45 | Will any changes be required to the ITB documents prepared by agencies? For example, can pricing sheets still be created in Excel or will the new system require a different format in order to automate bid tabs? | Yes, Agencies still have the option to use excel to send pricing sheets to P&P. |
| 46 | Will this help with Foreign travel? | Yes |
| 47 | For best use of Concur, what's your proposed ratio of T-Card holders per department? | This varies by Department based off volume, location, # of users, etc. |

| 48 | Can each department create their own approval process? Specifically, can we have more than 1 approval (we currently have 3)? | Follow-up required - more information to come |
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| 49 | currently non-travel meal purchase policy is within the travel reimbursement policy.  Would this change? | No |